



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Status Hearing Re: Receipt for Blocked Account

Age: 14 years DOB: 2/10/1998	GRACIELA MARTINEZ RUIZ aka GRACE RUIZ , mother, was appointed guardian of the estate on 2/23/12.	NEEDS/PROBLEMS/COMMENTS:
	Order to Deposit Money Into Blocked Account ordered all insurance proceeds received to be placed into a blocked account.	OFF CALENDAR. Receipt for Blocked Account was filed on 4/17/12.
Cont. from 040912	Estimated Value of the Estate: Personal property - \$135,000.00	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	The Court set this status hearing for the filing of the receipt for blocked account.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	Status Report filed on 4/4/12 states the guardian, Grace Ruiz, has not received the U.S. Army life insurance proceeds.	
Conf. Screen		
Letters	The death benefit claim is being processed through Prudential Insurance Company. On April 3, 2012, First Sergeant Beldsoe of the U.S. Army notified the attorney that he has been unable to determine the exact date the check will be issued by Prudential Insurance Company and received by the Guardian.	
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 5/25/12
		Updates:
		Recommendation:
		File 6 - Ruiz

Petition to Compel Turnover of the Betty Ruth Cozby Trust Pursuant to Probate Code Section 16061.5 and for Damages and Attorney's Fees Pursuant to Probate Code Section 16061.9

			JANICE POTTER is Petitioner.	NEEDS/PROBLEMS/ COMMENTS: Continued from 4/4/12. Minute order states that the matter may be taken off calendar if the documents are filed. 1. Petitioner requests the court order the Trustee to turn over relevant information on the administration of the trust. Under Probate Code 16061 the Trustee has a duty to report said information regarding the administration of the trust to a beneficiary, relevant to the beneficiary's interest. There has been no determination at this point that Petitioner is a beneficiary of the trust only that she is an heir of the Trustor. 2. Need Order.
			Petitioner states she is an heir at law, and believes she is a beneficiary of the Betty Ruth Cozby Trust.	
			Betty Ruth Cozby died in April 2011.	
			Betty Cozby was unmarried and did not have children, and her parents and siblings predeceased her. Petitioner is a niece of Betty Cozby and heir at law under applicable Probate Code intestacy statutes.	
			Petitioner believes Betty Cozby's friend, Edward D. Reimer, is the named successor Trustee of the Betty Ruth Cozby Trust.	
			Upon the death of Ruth Cozby the Trust became irrevocable. Petitioner states she requested orally, and then more formally, through counsel, a copy of the Trust. The formal request was made on 8/17/2011. No response has been received to the request.	
			Probate Code § 16061.5 provides that a trustee has a duty to provide a true and complete copy of the terms of an irrevocable trust, or irrevocable portion of a trust, to any beneficiary who requests it, and to any heir of a deceased settlor who requests it.	
			Wherefore, Petitioner seeks relief as follows:	
			1. For an Order compelling Edward D. Reimer to provide full and complete copies of the Betty Ruth Cozby trust, including any applicable schedules and amendments, if any;	
			2. For an Order compelling turnover of relevant information on the administration of assets of the Trust pursuant to Probate Code section 16061;	
			3. That Edward D. Reimer be ordered to personally pay Petitioner's attorney's fees and costs in filing and prosecuting this petition.	
Cont. from 022912, 040412				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order	X		
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

Atty Fanucchi, Edward L. (for Aleen Neumeier –Daughter- Petitioner and Michael P.
Boele –Son-Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to
Administer Under IAEA (Prob. C. 8002, 10450)

DOD:02/20/2012		ALEEN NEUMEIER and MICHAEL P. BOELE , named Co-Executors without bond, are Petitioners. Full IAEA- O.K. Will Dated: 08/01/2007 Residence: Fresno Publication: The Business Journal	NEEDS/PROBLEMS/COMMENTS: 1. The following individuals were not listed at #8 of the Petition as required: Beverly Boele, Dick Yegar, Tom Neumeier and Keith Morrison. Note: If the petition is granted status hearings will be set as follows: • Friday, November 9, 2012 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Friday, September 6, 2013 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			s/p
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.		Estimated Value of the Estate Personal Property - \$86,700.00 Real Property - \$133,600.00 Total: - \$220,300.00 Probate Referee: Steven Diebert	
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting		Reviewed by: KT/LV Reviewed on: 05/24/2012 Updates: Recommendation: File 10 - Boele	
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			